Probate Questionnaire

Information required for Probate or Administration of Estate

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Please complete all details as fully as possible using additional paper if required. If you do not know some of the information requested, please leave it blank.

1. Executors/Administrators details	
Full names, addresses, telephone numbers and occupations of the Executors or Administrators	
Name Occupation Address Telephone (day) Telephone (mobile) Email address Relationship to deceased	Name Occupation Address Telephone (day) Telephone (mobile) Email address Relationship to deceased

2. Deceased's details	
Name Other known names Occupation Date of birth Place of birth Country of domicile (please circle) England/Wales/Scotland/Northern Ireland/Other (please specify)	Last known address Date of death Place of death

Which of the following relatives are surviving (please tick the applicable boxes)					
Husband	☐	Wife	☐	Civil Partner	☐
Children	☐	Grandchildren	☐	Parents	☐
Grandparents	☐	Siblings	☐		

Full names and addresses of any surviving spouse and adult children	
Name Address Date of birth	Name Address Date of birth
Name and date of birth of any children or other next-of-kin who are under 18	
Name Date of birth	Name Date of birth
Please provide the deceased's tax reference and National Insurance Number	
Tax reference	NI number
Did the deceased have an accountant? If yes, please provide the details	
Name Address	Telephone Email

3. Details of Will	
Date of last Will (if any) and any Codicils	
Date of Will	Date of Codicils
Full names and addresses of beneficiaries, if different from the Will	
Name Address	Name Address
Name and date of death of any beneficiaries who have died	
Name Date of death	Name Date of death
Name and date of birth of any beneficiaries who are under 18 (other than the deceased's children or next of kin)	
Name Date of birth	Name Date of birth
4. Funeral arrangements and death notice	
What is the name and address of the undertaker?	
Name Telephone	Address
Particulars of any funeral arrangements or obituary notices required	

5. Deceased's property

Securities and investments (shares etc) please list and state where held	
Name and address of investment managers	
Name Address	Name Address
National Savings bank accounts, National Savings Certificates, Premium Bonds, etc. Please state where passbooks, certificaties, etc are kept	
Details and location	
Loose cash in the house, uncashed cheques	£
Bank and building society accounts. Please state where passbooks (if applicable) are kept	
Name Address Account Number	Name Address Account Number

Life insurance policies	
Provider	Policy Number
Estimated value and details of significant furniture, jewellery, car and personal effects. Is there any inventory or valuation? Are they insured and if so, where is the policy? Please provide details below	
House, property or land, stating whether freehold or leasehold and where the title documents are kept. Please provide an approximate value for the property. Please also provide particulars of house and contents insurance and where the policies are kept	
If the property will not be sold, please provide the name of the valuers to be instructed	
What rents are received? (if applicable)	

Particulars of any business or partnership interests. Please provide a copy of the last two sets of Accounts	
Employees' names and particulars of wages and dates to which paid	
Any income to the date of death including pension, salary or income from any settlement, Will or other trust.	
£	£
£	£
Any other property. Please include here any details of any foreign property stating whether the deceased made a Will in respect of such property and the full name and address of their lawyer abroad	

6. Liabilities
Debts, mortgages, rents due, funeral expenses. Please forward any accounts eg Council Tax, water, gas, electricity, telephone, credit cards, store cards etc. Please note that these do not need be paid yet
Has the deceased given any guarantees during their lifetime eg to a bank, which are still outstanding? In addition, is there any possible claim against the deceased as an original lessee, or a lessee generally? (The Executors may protect themselves by advertising under section 27 Trustee Act 1925 but a claimant may still have a right to trace against the beneficiaries)

7. Transferable Nil Rate Band
If the deceased was pre-deceased by their spouse or civil partner, please provide the following information
Details of who benefitted under the Will or intestacy of the spouse or civil partner and what the beneficiaries were entitled to receive
Whether any jointly owned assets of assets in trust formed part of the estate or civil partner
Whether the spouse or civil partner had made any gifts or other transfers within seven years before the date of their death that were chargeable on their death
The date and place of marriage
Please provide copies of the following: • **Grant of Representation to the estate of the spouse or civil partner** • **the spouse or civil partner's Will, if any** • **any Deed of Variation**

8. Gifts, trusts and joint property

Particulars of any gifts made within seven years of the date of death with the names and addresses of donees and date of gift.
Particulars of any trust or settlement created or additional assets transferred to an existing trust or settlement by the deceased including the seven years preceding the earliest date of the gift shown at question 7 above.
Particulars of any other settlement, Will or trust of which the deceased was a trustee or beneficiary, and any trust made by the deceased not referred to above.
Did the deceased give away any assets which they continued to enjoy or make any financial contribution to the purchase of property held in the name of another individual but which they used? If so, provide particulars and relevant dates.
Particulars of any legacies received within five years of the date of death
Assets held in joint names. Details of joint holders, date of acquisition and who provided the funds.

Inheritance (Provision for Family and Dependants) Act 1975
We will explain the provisions of the Act at our first meeting
Is anyone financially supported by the deceased? Or is there a direct family member (eg spouse, or former spouse who did not remarry or child) who the deceased has not provided for in their Will? Please provide details (please note, the time limit for claiming under the act is six months after the Grant of Probate). To obtain the protection of the act the executors should retain an appropriate proportion of the estate as a reserve until the time limit has elapsed)
Deed of Variation/Disclaimer
We will explain at our first meeting the tax advantages which may be obtained and the two year limit.

Don't forget

We recommend that the family should contact the Department of Social Security to check whether they are entitled to any state benefits as a result of the death. We do not advise on Social Security law.

CHECKLIST

Please bring as many as possible of the following documents and papers to our first meeting.

- The Will (if not already held by us) or details of its whereabouts (if held by a bank or another firm of solicitors)
- Death Certificate
- Recent bank statements and cheque books
- Building society passbooks
- Any insurance or annuity policies, or premium renewal notices, including life policies and insurance of the house and contents. If there is a life policy which can be cashed in immediately on death, a copy of it must be kept. The Capital Taxes Office always asks to see copies of such policies
- The deeds of any house/flat or other property owned by the deceased either alone or jointly, or details of the bank or institution which is holding them
- The pension order book and any recent correspondence with the DWP or H M Paymaster General. Any correspondence in connection with any other pension of annuity
- Any tax papers including copies of completed Tax Returns, tax assessments, notices of coding etc
- Any unpaid bills, the Funeral Account, any recently paid bills and in particular recent Council Tax and water rate bills
- Any documents or correspondence giving evidence of the terms under which the occupants of any house or flat lived there and the contributions, if any which they paid. This applies if there was some form of lease, licence or other rental agreement
- Any papers or deeds referring to a trust or settlement either created by the deceased or from which benefits or money were received by the deceased
- Any documents or correspondence giving evidence of the terms under which the occupants of any house or flat lived there and the contributions, if any which they paid. This applies if there was some form or lease, licence or other rental agreement
- Details of any jewellery or silver and any valuable pictures or antiques
- Details of any partnership of which the deceased was a partner, including a copy of the partnership deed
- Details of any shares owned in the private company including a copy of the most recent company accounts, the Share Certificate, Shareholders Agreement and name and address of the company accountants
- Any other information or papers which seem to be relevant or useful

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